The KidTraks Upgrade Begins

Many of you remember that we introduced a new Gateway to access the KidTraks system last fall, and with the announcement of that update, we mentioned that this would lead to other intermittent updates to the other programs that are part of the MaGIK system. Announcements for these updates will be released when major changes have been made and will outline the changes on the newly designed pages.

Introduction to the New Design Components

Panel

Panels are used to organize and display information on the new pages

1. Panel Header

2. Panel Title

3. Panel Body

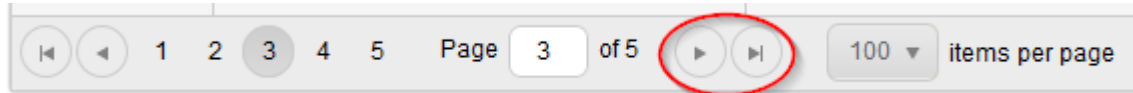**Grid**

New grid features

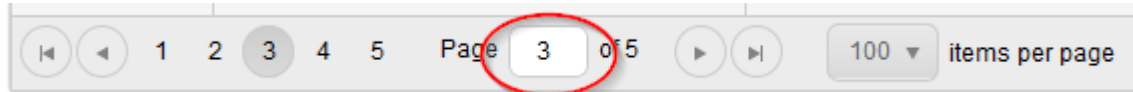1. Export buttons are in the panel header above the grid but look different
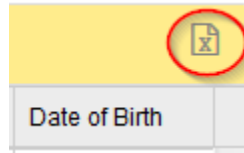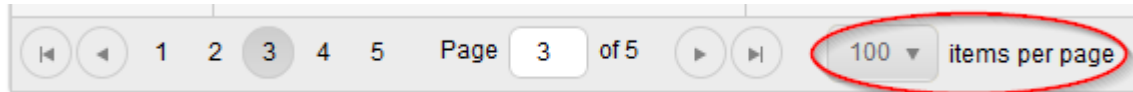

2. First and Previous buttons
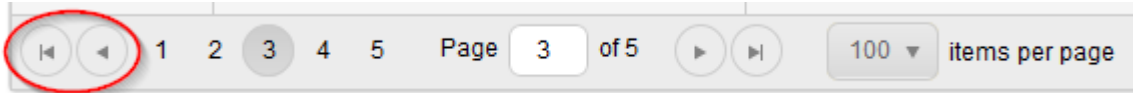
3. Next and Last buttons

4. The ability to jump to a particular page

5. You can now choose how many results are displayed per page

Collapsible Grid

Some grids will have sections that can be expanded and collapsed by clicking on the dark grey arrow (see Service Referrals below for more).

Action Menu

Action ▾

The Action Menu no longer has a Go button. Clicking on the item in the dropdown menu is all that is necessary now for the action.

Navigation Panel

On long pages that require long vertical scrolling, we are including Navigation Panels on the left-hand side of the pages containing links that will take you directly to different panels/sections on the page.

New Warning Message Style

Note: Are you sure you want to refer for services by creating a new KidTraks Referral Case Type?

The New Person Inquiry/Information Pages

The first section of KidTraks to have this new style applied to it is the Person Info/Inquiry pages. The newly designed pages will incorporate these new design components and will appear quite different to the pages you are used to using, but let me assure you that the functionality of the pages will not be very different at all. Here is an outline of these changes and how they will affect the functionality of the pages.

Person Inquiry

Find Existing

- Advance/Basic Search function has been removed
- MaGIK Case ID and MaGIK Person ID search criteria removed from the Advance Search and added to the default list
- ICWIS Person ID and ICWIS Case ID removed as obsolete
- MaGIK Case ID and MaGIK Person ID renamed Casebook Case ID and Casebook Person ID

- The Search Results will still show up in a grid

Add New

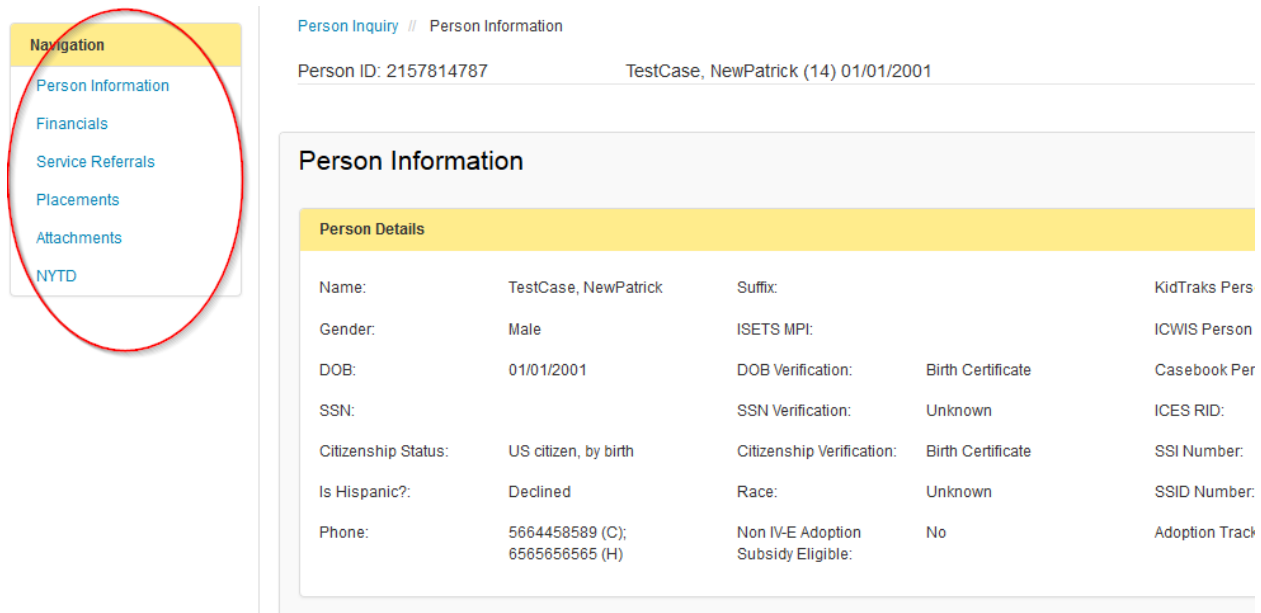The Add New tab has only been changed to the new look and feel. No functionality has changed.:

Filling out the required fields and clicking Add will still take you to the current Case Information page.

Person Information

The first thing you may notice when you arrive on the newly designed Person Information page is the absence of the Person Information, Services, Placements, Financials, Attachments, and NYTD tabs. One of the trends in our new design is less use of tabs. As a result the items from those tabs have all been moved to this one page – Person Information.

Moving these items to one page has resulted in a long page. Therefore, we have included a Navigation Panel.
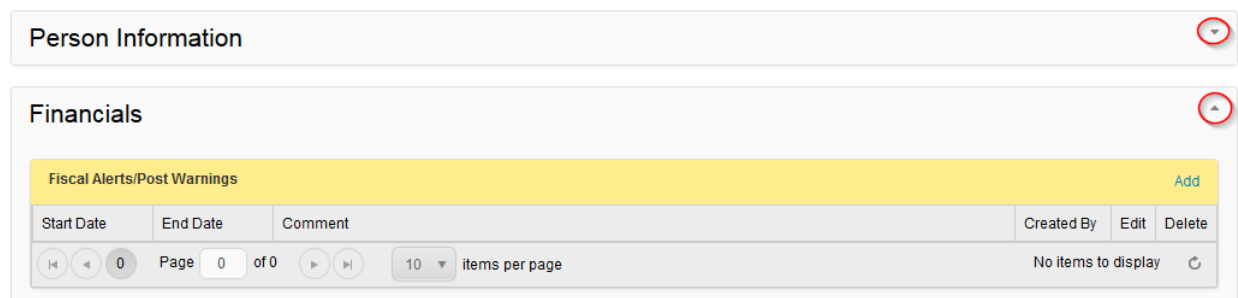

Clicking on the links in this panel will take you directly to that section on the page.

Collapsible Sections

Also to help with the length of the page, the sections with the most content, Person Information and Financials, are collapsible.

Clicking on the black arrow on the right will collapse and expand these two sections, but when first accessing the page both sections default to open.

Repositioned Action Items

The next thing you may notice is that there are several items that are missing from the Action menu at the top of the page. Several of these missing items have been moved to their specific panels.

Add Post Warning

Add Medical Eligibility

<u>Create Referral</u>

View Financial Summary, Edit Demographic Information (for probation cases), Add to Tracker, and Edit Financial Information are still included in the Action menu.
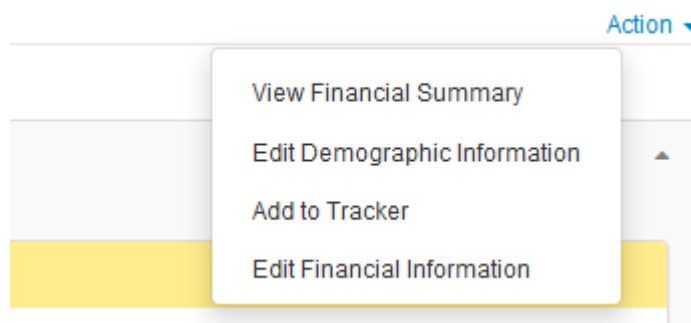
The remaining Items (Add Alias, Add County Payment, and Add Appeal For Services) have been removed from the list as obsolete.

Functionality

The functionality of this page has not been changed, but the process by which it is completed is different. The Person Information Page is a read-only page. Nothing on the page can be edited here. The editing, adding, or managing of information is now done through links that take you to a separate page.

There are three small exceptions to this rule, Edit Financial information, Add Post Warning, and Edit Receipt Instructions. These exceptions are handled by small pop-ups on the page.
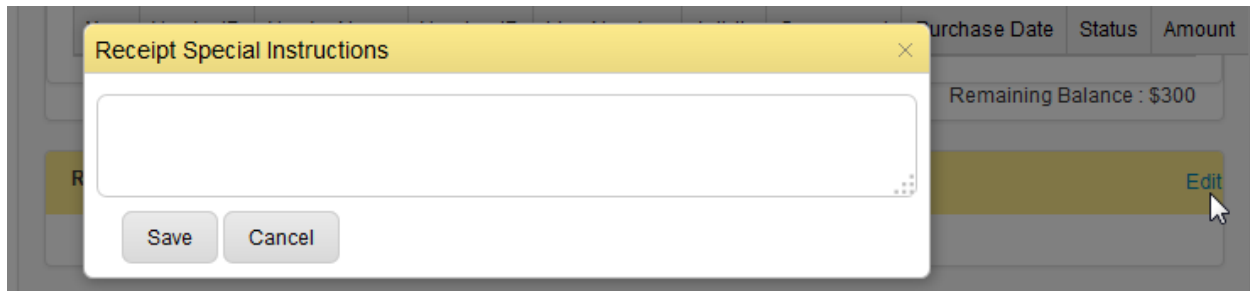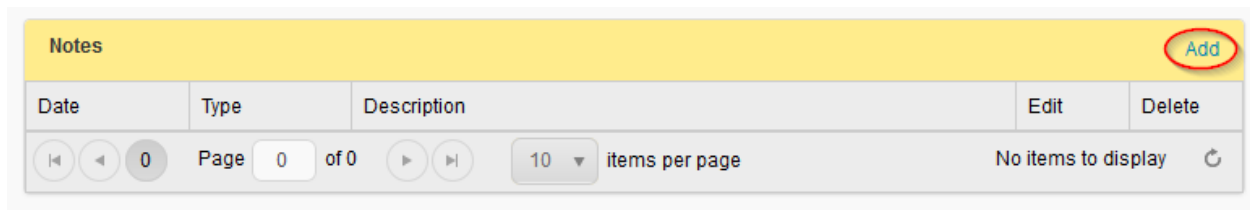
Edit Financial Information

Add Post Warning

Edit Receipt Instructions

For the items that are more complicated, there are links in the appropriate panel header that will take you to a different page to perform the necessary action.

For some items it is simply an Add link:
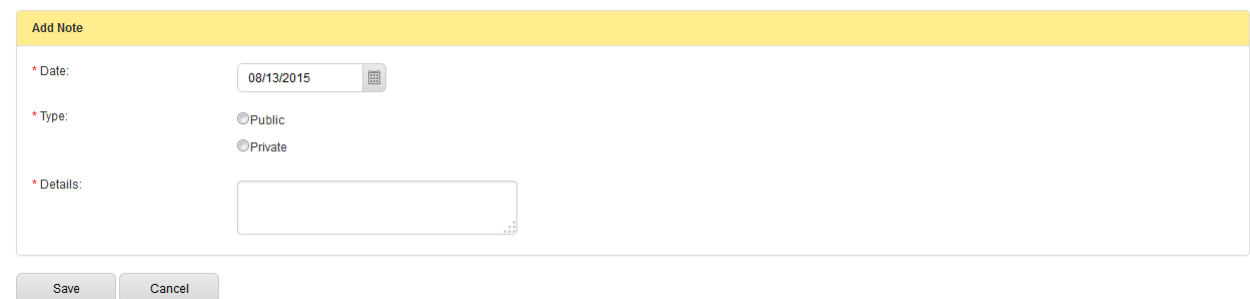
Add Notes

Add Notes Page

Add Attachments

Add Attachment Page

Add Attachment

Please select the file to be attached:

Select files...

* Description: [_____]

Save   Close

When the Actions needed are more complicated than just adding something, the panels have a Manage Link that takes you to the Manage Page. Manage Pages are new to KidTraks where multiple actions/edits can be done and then Saved (or Canceled) to take you back to the Information page.

Manage Person Education (probation case)

Person Education   Manage

County	School	Other	Grade	Begin Date	End Date	Status

|◄ ◄ 0   Page 0 of 0 ► ►| 10 ▼ items per page   No items to display   ↻

Manage Person Education Page

Manage Education

* County: Select ▼

School Name: Select ▼

If Other, please enter description: [_____]

* Status: ○ Full Time
                                   ○ Part Time

* Grade: Select ▼

* Begin Date: [_____] 📅

End Date: [_____] 📅

Add

County	School	Other	Grade	Begin Date	End Date	Status	Edit	Delete

|◄ ◄ 0   Page 0 of 0 ► ►| 5 ▼ items per page   No items to display   ↻

Save   Close

Additional Medicaid Information

Medicaid Eligibility Page

The Add link in the Medical Eligibility panel on this manage page will take you to The Add Medicaid Eligibility page.

On this page it's important to note that you will no longer have the ability to upload attachments. These Medicaid relevant attachments are to be uploaded in Casebook now. But, if there are legacy attachments that were uploaded to KidTraks, they will still be displayed in this panel in the table on the right.

Other Links

CANS

The CANS functionality has not been changed but the links have been.

1. Enter CANS Assessment is now a link instead of a button, but still takes you to the current page for entering the Assessment

2. The CANS Help link is now labeled Email

Service Referrals

The Service Referrals header has an Action menu because more actions may need to be added in the future.

Clicking on Create Service Referral on the Action Menu opens a new page instead of the current pop-up.

This page functions the same as the pop-up. Clicking on the Case ID for the appropriate case for the referral populates the Case ID field. If the referral is needed for a new case, Adoption etc, clicking the Create New Case link will populate the Case ID field with the word New, and a warning will pop-up asking to confirm that you need to make this type of referral.

The Submit button will then continue to the current Referral Wizard.

NYTD

The NYTD functionality is not being updated at this time, so we have included a redirect link in the NYTD panel header that will take you to the current NYTD page

Conclusion

These are the major changes made to the Person Information and Person Inquiry pages. Hopefully, you will not notice any significant difference in functionality.